

Gateway Training for New County Auditors

The Indiana Gateway for Government Units (Gateway) is one portal, or access point, that local governmental units use to submit information to the State. The Gateway increases the efficiency in the collection and decimation of local government financial information. It also provides taxpayer-friendly reports and interactive research tools online, dramatically increasing transparency and accessibility of local government financial information for the citizens and taxpayers of Indiana.

The Gateway was developed as a collaborative project among the Department of Local Government Finance (DLGF), the State Board of Accounts (SBOA), and the Indiana Business Research Center (IBRC) at Indiana University's Kelley School of Business as part of the Information for Indiana (IFI) initiative. IBRC also hosts and maintains the site. Funding is provided by IBRC and the State of Indiana.

Gateway Applications

SBoA

Annual Report – Due March 1

100R – Due January 31

DLGF

Budget

Debt Management

Property Files Upload

The official in office during the respective filing period is responsible for filing the report.

Important Web Sites

SBoA Main Page: <http://www.in.gov/sboa/3700.htm>

SBoA Annual Report Page: <http://www.in.gov/sboa/3700.htm>

SBoA 100R Page: <http://www.in.gov/sboa/3923.htm>

DLGF Main Page: <http://www.in.gov/dlzf/index.htm>

DLGF Gateway Page: <http://www.in.gov/dlzf/8918.htm>

Gateway Logon Page: <https://gateway.ifionline.org/login.aspx>

Gateway Public Access Page: <https://gateway.ifionline.org/>

Getting Help

User Guides

Videos

E-mail

For SBoA applications, annualreport@sboa.in.gov

For DLGF applications, gateway@dlzf.in.gov

One common logon to access all applications

User ID is your e-mail address.

When you get your County e-mail address, please send an e-mail to annualreport@sboa.in.gov to request an ID to be setup in Gateway. Also indicate who is the outgoing Auditor so we can inactive them.

Permissions

Each user may have access to one or all of the Gateway applications. The user can also have different permission levels for each application.

- Submit – User can add/change/delete information. User can also submit the report. Only one submitter for each unit and it should be the responsible official, i.e. the County Auditor
- Edit – User can add/change/delete information. However, user can NOT submit the report.
- Read – User can view the information, but cannot add/change/delete.

If you make staff changes, you may need to request some Gateway users to be inactivated and new users added. When you send your request for a Gateway User ID you can also request a list of Gateway users for your County for your review.

Gateway Training for New County Auditors

Gateway 100R

IC 5-11-13-1

Local Governmental Units are required to submit to the Board of Accounts a Certified Report of Names, Addresses, Duties and Compensation of Public Employees (Form 100R)

Due January 31

Report the following for all people employed by the unit for the previous year:

- Employee Name

- Office or Department

- Business Address

- Job Title, Position, or Duties

- Compensation – Total amount paid to the employee during the previous year.

Also answer questions regarding benefits and nepotism.

Gateway Annual Financial Report

IC 5-11-1-4

Local Governmental Units are required to submit to the Board of Accounts financial reports for the past year.

Due 60 days after year end, March 1

Report the following:

- Cash and Investment Balances for each Fund

- Receipts and Disbursements for each Fund

- Debt

- Leases

- Capital Assets

- Accounts Receivable and Payable

- Grants

- Financial Assistance to Non-Governmental Entities

- Schedule of Officials

Gateway Training for New County Auditors

Selected Screen Shots

Logon Screen

Gateway Login - Windows Internet Explorer

https://gateway.ifionline.org/login.aspx

File Edit View Favorites Tools Help

★ Favorites Gateway Login

Tip: This site works best in [Internet Explorer 9](#), [Firefox](#) and [Chrome](#)

The Indiana Gateway for Government Units provides a central commons for local units to submit their financial forms to the State of Indiana.

Authorized Personnel Login

User Name:

Password:

*After 5 failed attempts, account will be locked

[Forgot your password?](#)

Applications Currently Available

- [Debt Management](#)
- [Annual Financial Report](#)

The Indiana Gateway for Government Units provides a central portal for local governments to submit forms to the [Indiana Department of Local Government Finance](#) and the [State Board of Accounts](#). It is maintained by the [Indiana Business Research Center](#) as part of the Information for Indiana Initiative.

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- [Technical Issues](#)
- [DLGF](#)

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Application Selection Screen



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Unit Selection Screen

Select a Unit - Windows Internet Explorer

http://gatewaytest.ifiionline.org/100r/units_list.aspx

File Edit View Favorites Tools Help

★ Favorites Select a Unit

Home About Account Settings Help Logout

Indiana State Board of Accounts

[All Units](#)

Select Unit

Select Unit from List

Currently Viewing Year: 2012

Click a link below to select your unit.

Unit Code	Unit Name Link	Unit Type	Unit County
0000	Adams County	COUNTY	Adams
0453	Berne Civil City	CITY	Adams
0002	French Township	TOWNSHIP	Adams
0000	Bartholomew County	COUNTY	Bartholomew
0200	Columbus Civil City	CITY	Bartholomew
0000	Boone County	COUNTY	Boone
0004	Perry Township	TOWNSHIP	Vanderburgh
9996	Sboa City Unit	CITY	sboatest
9998	Sboa County Unit	COUNTY	sboatest
9994	Sboa Library Unit	LIBRARY	sboatest
9995	Sboa School Unit	SCHOOL	sboatest
9997	Sboa Township Unit	TOWNSHIP	sboatest

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100R Questions – Screen 1

Unit Questions - Windows Internet Explorer

http://gatewaytest.ifionline.org/100r/unit_questions.aspx

File Edit View Favorites Tools Help

Unit Questions

Home About Account Settings Help Logout

Indiana State Board of Accounts

Select Unit and Year > Main Menu > Unit Questions

Unit: Boone County
Year: 2012

100R Unit Questions

Please answer all of these questions – they help determine what is required for your unit to complete the 100R submission via Gateway.

1. Please enter the number of employees (full and part time) that you paid compensation to **anytime during the past year**. Use IRS guidelines to determine employment status and compensation. If you did not have any paid employees, enter 0.

10

Proceed Cancel

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100R Questions – Screen 2

Unit Questions - Windows Internet Explorer
http://gatewaytest.ifionline.org/100r/unit_questions.aspx

File Edit View Favorites Tools Help

Unit Questions

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for government units

An Information for Indiana Data Site

Home About Account Settings Help Logout

Indiana State Board of Accounts

Select Unit and Year > Main Menu > Unit Questions

Unit: Boone County
Year: 2012

100R Unit Questions

Please answer all of these questions – they help determine what is required for your unit to complete the 100R submission via Gateway.

2. Will you enter the data manually or upload a file?	<input checked="" type="radio"/> Manual <input type="radio"/> Upload	
	Full-Time	Part-Time
3. Are health benefits provided to employees?	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
4. Are pension/retirement benefits provided to employees?	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
5. Are any other benefits provided to employees?	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No

Has your unit implemented the following?

6. A nepotism policy per IC 36-1-20.2	<input checked="" type="radio"/> Yes <input type="radio"/> No
7. A contracting policy per IC 36-1-21	<input checked="" type="radio"/> Yes <input type="radio"/> No

Proceed Cancel

Done

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100R Main Menu

The screenshot shows a Windows Internet Explorer browser window displaying the Gateway Indiana website. The address bar shows the URL: http://gatewaytest.ifionline.org/100r/SBOA_Menu.aspx. The website header includes the Gateway logo, the text "for government units", and "An Information for Indiana Data Site". The navigation bar contains links: Home, About, Account Settings, Help, and Logout. The main content area is titled "100R Main Menu" and includes a sub-header "Select Unit and Year > 100R Main Menu". The status of the unit is "Boone County" and the year is "2012". The main content area lists four sections: Unit Questions, Employee Data Entry, 100R Report Outputs, and Submit 100R. Each section has a description and a status. The status for Unit Questions is "Complete", for Employee Data Entry is "0 Rows Entered", for 100R Report Outputs is "Available", and for Submit 100R is "Not Submitted". The footer contains information about the Indiana Gateway for Government Units, contact information for the State Board of Accounts, and a "POWERED BY information for INDIANA" logo.

Gateway INDIANA
for government units

An Information for Indiana Data Site

Home About Account Settings Help Logout

Indiana State Board of Accounts

Select Unit and Year > 100R Main Menu

Unit: Boone County
Year: 2012

100R Main Menu

The sections below are the ones that are required to complete your report. Some of these sections are based on the answers that you gave to the questions on the previous screen. To change any of the answers to those questions, click on the Questions option on the menu.

		Status
Unit Questions	The answers to these questions help tailor the form and validation to your unit.	Complete
Employee Data Entry	Use the form entry for manual entering of the information or to edit what you uploaded.	0 Rows Entered
100R Report Outputs	Once you have entered or uploaded your information, you can use this option to view your entries, print them, or download them into an Excel file.	Available
Submit 100R	This process includes validation to ensure the information has been entered properly and that the number of records matches the number of employees you indicated in the Questions section. Once any errors have been corrected, you will see the Proceed to Submit button appear and you will click on that to complete the submission.	Not Submitted

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Annual Report Questions

Unit Questions - Windows Internet Explorer

http://gatewaytest.ifiionline.org/afr/Unit_Questions.aspx

File Edit View Favorites Tools Help

Unit Questions

Home About Account Settings Help Logout

Indiana State
Board of Accounts

Select Unit and year > Unit Questions

Please answer all of the questions below by clicking Yes or No as appropriate. Please make sure you answer the questions correctly as they will determine the information required for you to complete your annual report.

Unit: Boone County
Year: 2012

1. Does your unit disburse any money from grants? The amount of Federal funding that is disbursed during the year affects the type of engagement that you are required to have performed by the State Board of Accounts as well as the format and content of the Financial Statements. Click below for more information on grants. Additional Information	<input checked="" type="radio"/> Yes <input type="radio"/> No
2. Did your unit disburse money for financial assistance to non-governmental entities? Examples include Volunteer Fire Departments, 4H, YMCA, Youth Leagues, Senior Citizen Centers, etc. Do not consider amounts you paid for goods or services in answering this question.	<input checked="" type="radio"/> Yes <input type="radio"/> No
3. Does your unit have any Utilities or other Enterprises? Governmental units often provide services that are operated like a business and charge fees to external users for goods or services rather than receiving tax dollars. These activities are called Enterprises. The most common Enterprises are utilities such as Water and Wastewater. Other types of Enterprises could include Public Transportation, Convention Centers, Parking Garages, Airports, Internet Services, etc.	<input type="radio"/> Yes <input checked="" type="radio"/> No
4. Does your unit departmentalize? Departments are areas of responsibility within a unit that do not act like enterprises. Examples of departments include: Auditor, Sheriff, Mayor.	<input checked="" type="radio"/> Yes <input type="radio"/> No
5. Does your unit have any outstanding debt? Debt can be in the form of bonds, notes, loans, or judgments payable over more than one year. Leases are considered separately (see question 6 below).	<input checked="" type="radio"/> Yes <input type="radio"/> No
6. Does your unit have any outstanding leases? A contract by which one party conveys land, property, services, etc., to another for a specified time, usually in return for a periodic payment.	<input checked="" type="radio"/> Yes <input type="radio"/> No
7. Do you maintain records listing the types and values of assets owned by the unit? Assets include land, buildings, infrastructure, vehicles, equipment, etc.	<input checked="" type="radio"/> Yes <input type="radio"/> No
8. Do you have data files from your accounting system to upload your beginning fund balances, receipts and disbursements?	<input type="radio"/> Yes <input type="radio"/> No

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Annual Report Questions - continued

Unit Questions - Windows Internet Explorer

http://gatewaytest.ifiionline.org/afr/Unit_Questions.aspx

File Edit View Favorites Tools Help

★ Favorites Unit Questions

Home Page Safety Tools

<p>3. Does your unit have any Utilities or other Enterprises? Governmental units often provide services that are operated like a business and charge fees to external users for goods or services rather than receiving tax dollars. These activities are called Enterprises. The most common Enterprises are utilities such as Water and Wastewater. Other types of Enterprises could include Public Transportation, Convention Centers, Parking Garages, Airports, Internet Services, etc.</p>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
<p>4. Does your unit departmentalize? Departments are areas of responsibility within a unit that do not act like enterprises. Examples of departments include: Auditor, Sheriff, Mayor.</p>	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<p>5. Does your unit have any outstanding debt? Debt can be in the form of bonds, notes, loans, or judgments payable over more than one year. Leases are considered separately (see question 6 below).</p>	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<p>6. Does your unit have any outstanding leases? A contract by which one party conveys land, property, services, etc., to another for a specified time, usually in return for a periodic payment.</p>	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<p>7. Do you maintain records listing the types and values of assets owned by the unit? Assets include land, buildings, infrastructure, vehicles, equipment, etc.</p>	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<p>8. Do you have data files from your accounting system to upload your beginning fund balances, receipts and disbursements? You must get these files from your vendor's accounting system. If you have questions on how to get these files, please contact your vendor.</p>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
<p>9. Will your county report using the new county chart of accounts? Official implementation of the new County chart of accounts has been delayed until January 1, 2013. However, because several counties have already implemented the new chart of accounts, the 2012 Annual Financial Report has been modified to accept the old standard fund numbers for Counties as well as the new County fund numbers. The new County fund numbers are the same as the Fund number in the new chart of accounts but prefixed with 10 to indicate that they are standard funds rather than custom funds.</p>	<input type="radio"/> Yes <input checked="" type="radio"/> No	
<div style="display: flex; justify-content: space-between;"> Proceed Cancel </div>		

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Annual Report Main Menu

Main Menu - Windows Internet Explorer
http://gatewaytest.ifionline.org/afr/SBOA_Menu.aspx

File Edit View Favorites Tools Help

★ Favorites Main Menu

for government units An Information for Indiana Data Site

Home About Account Settings Help Logout

Indiana State Board of Accounts

Select Unit and Year > AFR Main Menu Unit: Boone County Year: 2012

Annual Financial Report Main Menu

The sections below are the ones that are required to complete your annual financial report. Some of these sections are based on the answers that you gave to the questions on the previous screen. If you need to go back and change any of the answers to those questions, click on Unit Questions above.

Unit Information

	Status
Unit Questions	Complete
Departments	37 Department(s)
Schedule of Officials	Not Complete

Core Reporting

	Status
Financial Data by Fund	148 Fund(s)
Capital Assets	\$0 in Assets
Grants	Not Entered
Accounts Payable/Receivable	1 Record(s)
Debt	8 Record(s)
Leases	Not Entered
Financial Assistance to Non Governmental Entities	4 Record(s)

System Functions

	Status
Annual Report Outputs	Available
Review Submission	Available
Submit Annual Report	Not Submitted

The Indiana Gateway for Government Units provides a central portal for local governments to submit forms to

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Gateway Training for New County Auditors

The Annual Report and the New County Chart of Accounts

The Annual Report will now accept either the Old Funds or the Funds from the new Chart of Accounts

If you are uploading

- The validation for the correct Funds will be based on your answer to the Fund Question, Old or New.
- Regardless of which set of Funds you are using, Old or New, the Upload data will overwrite the Funds and Balances that rolled forward from last year.

If you are NOT uploading and using the OLD Funds:

- The Funds and Balances will roll forward from last year.
- You would then continue with manual data entry of the receipts and disbursements.

If you are NOT uploading and using the NEW Funds:

- The Funds and Balances will roll forward from last year, but they are the OLD Funds.
- As a result, you would need to delete the Old Funds and add the New Funds.

We are attempting to provide a partial solution if you want to use the New Funds but not Upload. Once you answer the questions and hit "Proceed" the system will:

- Delete all the Old Funds
- Add all the New Funds
- However, there will be NO Beginning Balances

This process can NOT be undone.

The official deadline for implementation of new Chart of accounts is January 1, 2013. Therefore, your 2013 books should be on the new Chart of Accounts. As a result, the 2013 Annual Report due in 2014 will only accept the NEW Funds. If you use the Old Funds for the 2012 Annual Report, and don't upload for 2013 you will have the same problem.